Chapter V: Working with Patient Lists

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Patient List

The **Patient List is the default tab** displayed when you enter the CRIS application. It provides easy access to patient charts and notifies you about new information regarding those patients. In addition to looking at information on the screen, you can print a patient list as a report to take with you on rounds. See Chapter 14 – Reports for printing details.

The information in the **Patient List** originates from the Admission Discharge Transfer (ADT) system.

Flags in the **Patient List** indicate that new or significant information about that patient exists. You can access information on new and unacknowledged alerts, documents, results, and orders for the selected patient from the **Patient List**. You can create special lists of selected patients and patient lists based on specific criteria, such as location or care provider.

Refresh

The **Refresh Screen** icon updates the **Patient List** and any of the other chart sections. We recommend that you refresh the screen often, to make sure that the **Patient List** displays the latest information. **Refresh Screen** is also available in the **View** menu.

Screen 5.1: Refresh Icons

Select Patient Charts

You must select a chart before you can open and view patient records.

Select one patient's chart:
1. From the **Patient List**, select the name of the patient whose chart you want to open.
2. Access a chart section by selecting a chart tab.

Select multiple patient charts:
1. From the **Patient List**, select the name of the first patient whose chart you want to open.
2. Hold down Ctrl and click each patient you want to select.
3. Select a chart section by selecting the appropriate chart tab. The chart for the first patient you selected in the **Patient List** shows first. Please note that the Next Patient and Previous Patient icons will not be displayed until a tab other then Patient List is selected.

4. Click **Next Patient** or **Previous Patient**, or from the **GoTo** menu, choose **Next Patient** or **Previous Patient**. You remain in the same chart section, but now display the record for the next or previous patient in the **Patient List**.

Screen 5.2: Next & Previous Icons
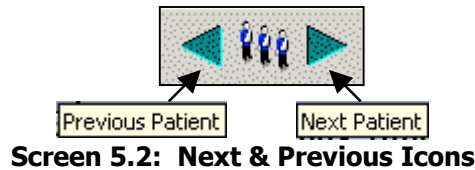
Deselect all but one patient:

Click on the name of the one patient whose chart you want to keep selected on the Patient List tab. Only the patient chart selected will be highlighted.

Use Flags to Track New Patient Information

Flags display on the **Patient List** to indicate that new information is available for a patient's chart. Flags can signal the following:

- *Check Orders* - a new order has been placed and needs acknowledgement
- *Unack Alerts* - a new alert has been generated
- *New Results* - a result has been completed for an order
- *New Orders* - a new order has been placed for the patient
- *New Documents* - clinical documentation has been charted on a patient
- *To Sign* - a signature is needed for an order or document

To display new results, new orders, new alerts, or new documents, you may need to activate the **Flag New** column in the **Patient List**.

Flag Notification

There are two types of flag notifications:

Green flag: displays for all new results within normal range, all new routine orders and new documents.

Red flag: display for one or more abnormal results, new stat orders and orders you must sign.

The Flag New Column

You can select one or more patients in the **Patient List** and turn the **Flag New** column on or off for the selected patients.

If a provider is assigned to a patient in CRIS, the **Flag New** column may be configured to be on, based on the provider's role for the patient. For example,

for an attending physician, the **Flag New** column is configured to be on to inform the physicians of all new orders, results, documents, etc. for that patient, from the beginning to the end of their stay. When a floor nurse is assigned to that patient, she/he could turn the **Flag New** column on to see all new information for the patient from the time they were transferred to the floor, or when she/he took over their care.

Steps to turn flags on or off:
1. On the **Patient List**, select the patient(s) for whom you want to turn the **Flag New** column on or off.
2. From the **Menu**, select **Actions - Flag New On** or **Flag New Off**.
3. If one patient is selected, the state of the **Flag New** column changes, depending on the option you chose. If multiple patients are selected, the **Flag New** dialog box opens, where you can confirm or cancel the action. An "X" in the Flag New column indicates this feature is turned on. Double click the "X" to disable this feature or set this column to Flag New Off.
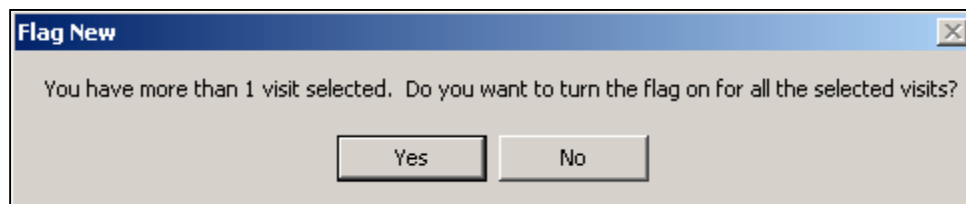
Screen 5.3: Flag New Dialog Box

Track Check Orders

You can display the Check Orders flag (in the Check Orders column) to acknowledge new orders that have been placed and status (final/ corrected/ interim results, active, discontinued, etc.) of orders. The orders can be selected individually via check boxes.

Steps to Track Check Orders
1. In the Patient List, Look at the cell in the Check Orders column to see if it contains:
   a. A triangular green flag, which indicates that new orders have been received since you last acknowledged having checked orders for this patient
   b. A rectangular red flag, which indicates that at least one of these orders is STAT
2. Double-click the flag to display the Check Orders. The **Orders to be Acknowledged** dialog box opens.
3. Select the appropriate orders that are acknowledged to activate the **Acknowledge** button.

4. To clear the flag, click **Acknowledge** on the **Orders to be Acknowledged** dialog box. Otherwise, click **Close**.

Screen 5.4: Check Orders Dialog Box

Track Alerts

Alert messages may appear to notify you of possible problems for a patient. Alerts can display as you are entering information, or at other times during your CRIS session. Many actions can generate alerts, such as duplicate orders, drug-allergy checking, attempting to enter orders more than a defined number of days in the future. The column on the **Patient List** that contains alert flags is **Unacknowledged Alerts**.

Steps to track new unacknowledged alerts
1. In the Patient List, select the patient for whom you want to view an unacknowledged alert.
5. Double-click the red flag in the **Unack Alerts** column. The **Unacknowledged Alerts** dialog box opens, listing all (new and old) unacknowledged alerts for the patient.
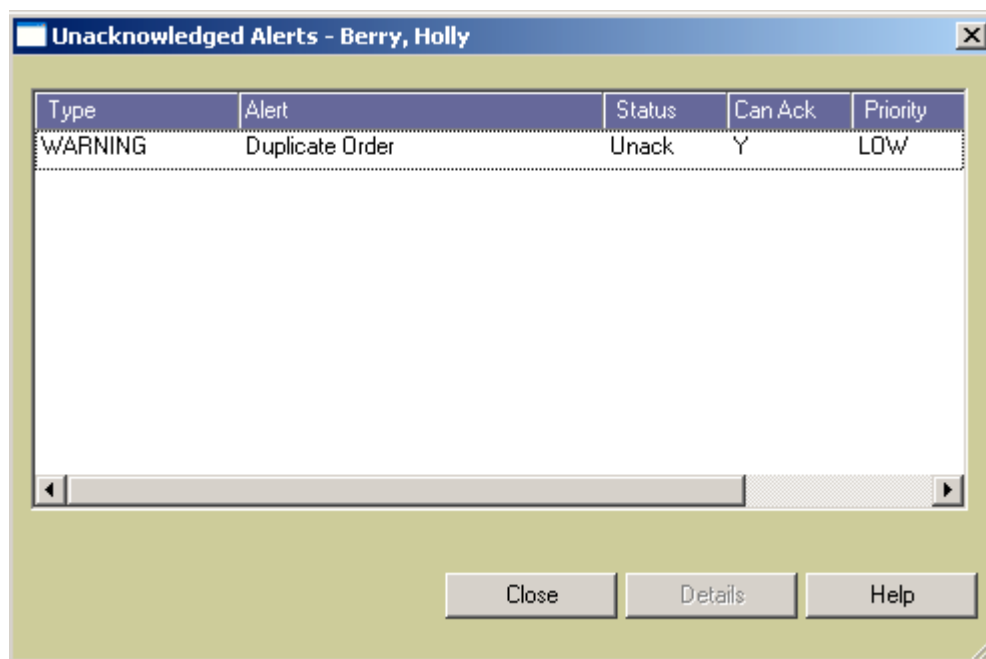
Screen 5.5: Unacknowledged Alerts

6. Double-click an alert, or select an alert and click **Details**. The **Alert Detail** dialog box opens.
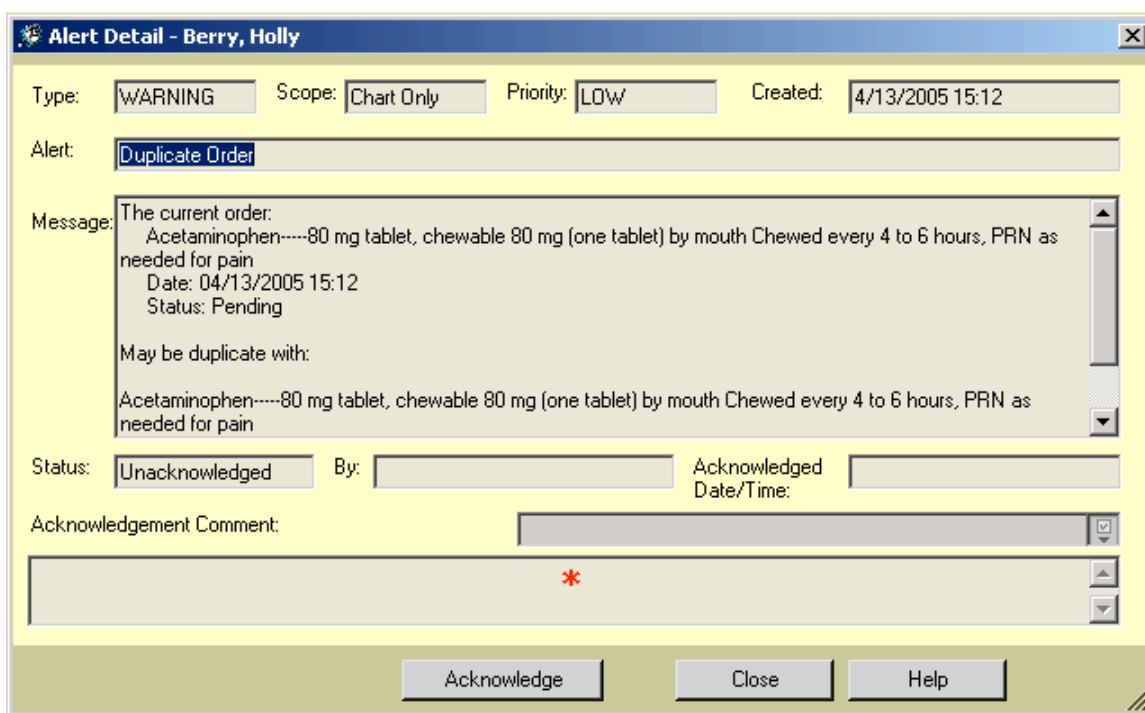
Screen 5.6: Alert Detail

7. To acknowledge the selected alert, click **Acknowledge**. (If you don't have the right to acknowledge alerts, the **Acknowledge** button is disabled.)
8. After you click **Acknowledge**, you can include an explanation of your action concerning the alert in the **Comments** field.
   Note: Only the person acknowledging an alert can enter a comment in the **Comment** field.
9. Click **Close**.

Track New Results

You can display the **New Results** flag (in the **New Results** column) to see results that have been received since you last acknowledged having reviewed all results for the patient.

Steps to track new results

1. In the **Patient List**, look at the cell in the **New Results** column to see if it contains:
   a. A triangular green flag, which indicates that new results have been received since you last acknowledged having received all results for this patient.
   b. A rectangular red flag, which indicates that at least one of the results falls outside the normal range.
2. Double-click the flag to display the new results. The **New Results** dialog box opens.
3. To clear the flag, click **Clear Flag** on the **New Results** dialog box. Otherwise, click **Don't Clear Flag**. When **Clear Flag** is selected this will only clear the flag from your view. Other users will still see the flag for this patient until they also select Clear Flag.

Track New Orders

You can display the **New Orders** flag to indicate that orders have been entered or substantially changed (such as canceled) since you last acknowledged having reviewed this patient's orders.

Screen 5.7: New Orders Window

Note: The **New Orders** flag will display when any previously held order is released since the user last acknowledged having reviewed this patient's order. It will not display for hold orders.

Steps to track new orders

1. In the **Patient List**, look at the **New Orders** column to see if it contains:
    a. A triangular green flag, which indicates that new orders have been entered since you last acknowledged having reviewed this patient's orders.
    b. A rectangular red flag, which indicates that at least one of these orders is STAT.
2. Double-click the flag to display the new orders. The **New Orders** dialog box opens.
3. To clear the flag, click **Clear Flag** on the **New Orders** dialog box. Otherwise, click **Don't Clear Flag**.

Track New Documents

You can display the **New Documents** flag (in the **New Documents** column) to indicate that documents have been entered since you last acknowledged having reviewed documents for the patient.

Steps to track new documents

1. In the **Patient List**, look at the cell in the **New Documents** column to see if it contains a triangular green flag, which indicates that new documents have been received since you last acknowledged having received documents for this patient.
2. Double-click the flag to display the new documents. The **New Documents** dialog box opens.
3. To clear the flag, check **Clear Flag** on the **New Documents** dialog box.

Tracking Orders That Need a Signature (Signature Manager)

The **To Sign** flag indicates that someone's electronic signature is required for an order. Most orders will be carried out without waiting for a signature. The **To Sign** flag, however, will make it easier and faster to sign or refuse orders.

Screen 5.8: New Orders Window

Steps to track orders that need a signature

1. In the **Patient List**, look at the **To Sign** column to see if it contains one of the following:

    a. A triangular green flag, which indicates that an electronic signature is required somewhere in the chart.

    b. A rectangular red flag with an exclamation mark, which indicates that your signature is required somewhere in the chart.

2. Double-click the flag to display orders that need to be signed. The **Signature Manager** dialog box opens. The checkbox dialog box may be enabled and checked, disabled, or enabled and unchecked, depending on whether you can sign the order as an individual or as part of a group.

3. You can click on the checkbox to either check or uncheck an order

4. Click **Sign**. The **Password Required** dialog box opens. If you are not authorized to sign this order, the **Sign** button is disabled.

5. Enter your user password. If there are no more orders or notes on this patient chart for you to sign, the flag on the **Patient List** is removed.

You can also refuse to sign an order. Follow the above steps from 1 – 3:

4. Click **Refuse**. The **Refuse Signature** diaglog box opens.

5. Enter a **Refusal Reason**, which is required.

6. Click **OK** then click **Close**.

Find Patients and Show Visits

You can use the **Find Patient** dialog box to search for patients who are currently registered or admitted, or those who have been discharged. After you have found a patient, you can show all visits for that patient and create a special or temporary list.

Screen 5.9: Find Patient Icon

Find a patient not on a list

1. From the **File** menu, choose **Find Patient**, or click **Find Patient** on the toolbar.

2. In the **Find Patient** dialog box, enter full or partial information to define the search criteria. The mandatory search criteria are:

    a. Partial **Last Name** in **Name** tab, or

    b. **ID Type** and **ID** in **Identification** tab, or

    c. **Role** and **Care Provider** in **Provider** tab (can be **Any Role**).

3. Click **Search**. A list of patients found displays in the **Search Results** window.

4. Double-click on a patient name, or select a patient name and click **Show Visits**. The **Show Visit** dialog box opens, and displays a list of the

patient's visits. Make sure to select the correct patient visit, this is most likely the most current visit (the visit with the **Visit Status** of **ADM** is the active visit). Note the Admit Date of the visit to ensure you are selecting the correct visit.

5. Do one of the following:
   a. To create a special list, select the desired visits in the **Show Visits** dialog box and click **Save Selected Patients**.
   b. To create a temporary list, select the visit(s) you want and click **OK**. The visits display on the **Patient List** under the name **Temporary List**. The temporary list is saved for the current session only.
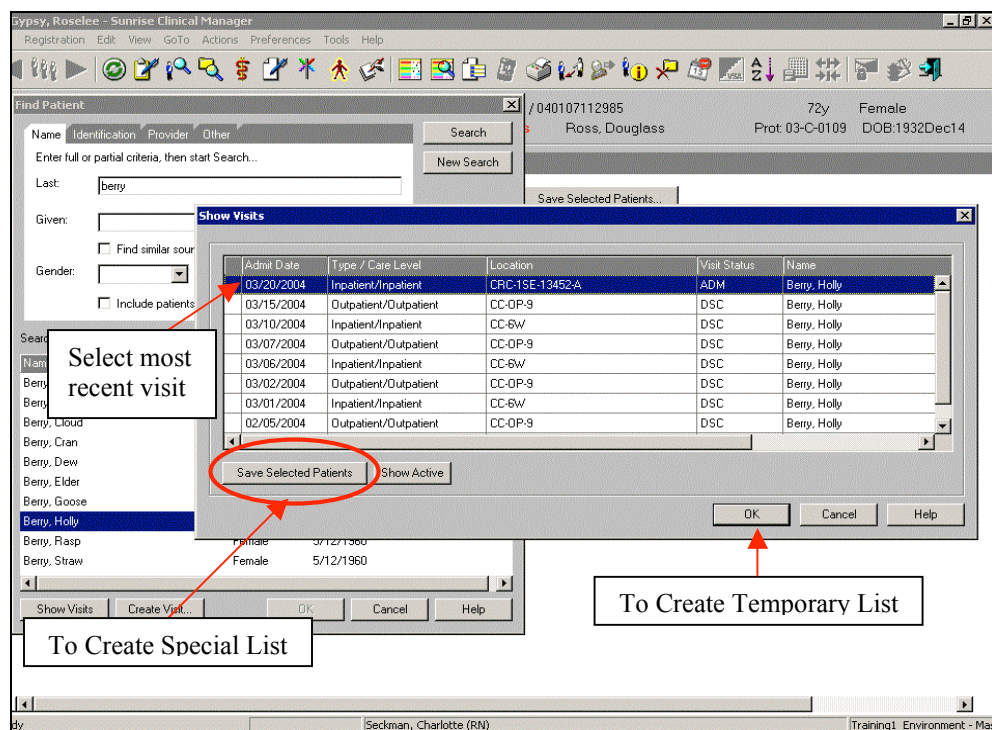
Screen 5.10: Show Visit Window

Create Your Own Patient Lists

CRIS may include default lists that you can use to access patient charts. You can also create your own lists of patients. You can create the following kinds of patient lists:

List	Description
Criteria-Based	List in which you specify the criteria - such as location or care provider for which patients will appear in the **Patient List**. List criteria are saved when you exit, and lists are updated while you're logged on to CRIS.
Special	List in which you group individual patients together for quick access. They do not need to have any characteristics in common. These lists are saved when you exit CRIS.
Temporary	List that you create for the current CRIS session only. These lists are *not* saved when you exit.

Table 5.1: Patient List Descriptions

Create patient lists where you define the criteria

Criteria-based lists are lists for which you define the criteria to be used to generate a patient list. For example, you can create a list that includes all the patients at a certain location, or all the patients cared for by a certain provider.

The information in criteria-based lists is updated automatically when you choose **Refresh Screen** or switch to a patient's chart. This enables you to see new information (for example, **New Results** flags) for the patients in your list.

Setting the criteria for your list

1. Select the **Patient List** tab.
2. From the **File** menu, choose **Maintain List**, and then **New**. The **Client Selection Criteria** dialog box opens.
3. Select one or more tabs containing the criteria to govern your list:
    a. **Your Role**: You can use the **Your Role** tab in the **Client Selection Criteria** dialog box to create a criteria-based list based on your role. When you create a criteria-based list based on your role, you can select one, several, or all of your provider roles. For example, you might be an Admitting physician for some patients, and a Consultant for other patients.
    b. **Location**: You can use the **Location** tab in the **Client Selection Criteria** dialog box to create a criteria-based list based on your logon location or other selected locations. For example, if you are Nurse Manager, you could create a list of all patients currently on 1 East. You can select multiple locations from the **Available Locations** list and add them to the **Selected Locations** list. If an available location has a plus sign to the left of the name, click on the plus sign to display additional locations.

c. **Providers**: You can use the **Providers** tab in the **Client Selection Criteria** dialog box to create a criteria-based list based on providers' names and roles. For example, if you are a physician in practice with associates and are on call, you could create a list of your associates' patients, as well as your own patients. You can enter all or part of the provider's last name. When you enter the first letter, a list of names starting with that letter displays. As you enter additional letters, the list scrolls to the first entry that matches.

d. **Service**: You can use the Service tab in the Client Selection Criteria dialog box to create a criteria-based list based on the patient's service (for example, Anesthesia or Medicine/Cardiology).

e. **Visit Status**: You can use the **Visit Status** tab in the **Client Selection Criteria** dialog box to create a criteria-based list based on patients who are currently admitted, or patients with a specified event on a date or date range.

   Note: At a minimum, you must specify the following criteria:
   - Provider (including your role), or
   - Location

Name criteria-based lists

After you have set the desired options in the **Client Selection Criteria** dialog box and click **OK**, you can name your criteria-based list. You can use the **Name** dialog box to create a new list with a new name, or to change the name of a list you are modifying.
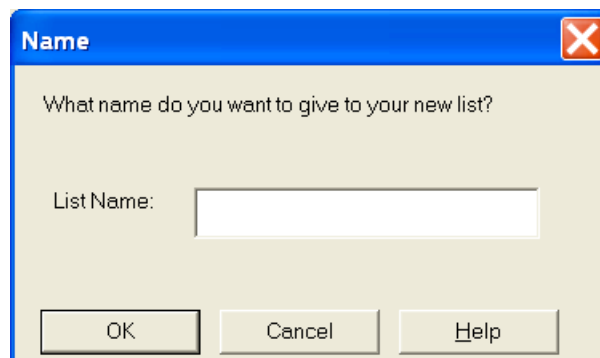
Screen 5.11: New List Name Dialog Box

Modify a criteria-based list

To modify a criteria-based list:

1. Select the **Patient List** tab.
2. Select a **Current List**.

3. From the **File** menu, choose **Maintain List**, then **Modify**. (This option is disabled if the current list is not a criteria-based list.) The **Client Selection Criteria** dialog box for the currently displayed list opens.
4. Use the tabs to change the criteria.
5. Click **OK**. The **Name** dialog box opens.
6. Enter a new name.
7. Click **OK**.

Create temporary lists

You can create a temporary list when you're not sure what patient list a patient is on. A temporary patient list is one you create for the current CRIS session only. It is not saved when you log off, and is not updated while you are running CRIS.

Create lists of specific patients

A special patient list contains the patients that you specify. For example, a staff nurse could create a special list for the patients assigned to them for this shift. The nurse could later maintain this list by adding new patient assignments and removing discharged patients.

Special lists are not updated when you log off of CRIS. You can, however, modify and update existing special lists. Special lists (ones created using the **Save Selected Patients** dialog box) are marked with an asterisk in the **Current List** drop-down list.

The **Save Selected Patients** dialog box allows you to select one or more patients from a list on the **Patient List** and to add them to an existing list, to use them to replace patients on an existing list, or to use them to create a new list.
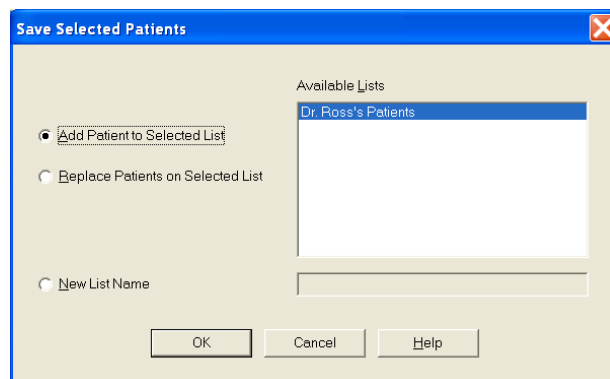
Screen 5.12: Save Selected Patients Dialog box

Create a new special patient list

1. Select the **Patient List** tab.
2. Select the patients' names that you want to include in a special list.
3. Do one of the following to open the **Save Selected Patients** dialog box:
   a. Click **Save Selected Patients** in the **Patient List**.
   b. From the **File** menu, select **Maintain List** and choose **Save Selected Patients**.
4. In the **Save Selected Patient** dialog box, choose **New List Name**.
5. Enter a name for the new list.
6. Click **OK**.

Remove patients from a special list

1. Select the **Patient List** tab.
2. Select a special list. Special lists are marked with an asterisk [*]. You can only remove patients from special lists, not criteria defined lists.
3. Select the patients that you want to remove from the special list.
4. From the **Edit** menu, choose **Remove Patient**, or choose the **Remove Patients** icon from the toolbar.

Screen 5.13: Remove Patient Icon

Add a patient to an existing special list

1. Select the **Patient List** tab.
2. Select the patients' names that you want to add to a special list.
3. Do one of the following to open the **Save Selected Patients** dialog box:
   a. Click **Save Selected Patients** in the **Patient List**.
   b. From the **File** menu, select **Maintain List** and choose **Save Selected Patients**.
4. In the **Save Selected Patient** dialog box, choose **Add Patient to Selected List**.
5. Select the list name from **Available Lists**.
6. Click **OK**.

Replace patients on an existing special list

1. Select the **Patient List** tab.
2. Select the patients' names that you want to replace in a special list.
3. Do one of the following to open the **Save Selected Patients** dialog box:

      a. Click **Save Selected Patients** in the **Patient List**.
      b. From the **File** menu, select **Maintain List** and choose **Save Selected Patients**.
4. In the **Save Selected Patient** dialog box, choose **Replace Patient on Selected List**.
5. Select the list name from **Available Lists**.
6. Click **OK**.

Delete a patient list
1. Select the **Patient List** tab.
2. Select the list you want to delete from the **Current List** drop-down list.
3. From the **Edit** menu, choose **Delete Current List**. A confirmation message displays.
4. Click **OK**.

Personalize Your Patient List View

Column selection

When you first log on to CRIS, data will be standardized for each type of user. You can personalize your patient list view by adding, deleting or re-arranging the columns.

Define columns in the Patient List
1. Select the **Patient List** tab.
2. Select a **Current List**.
3. From the **View** menu, choose **Column Selection**. The **Patient List Column Configuration** dialog box opens.
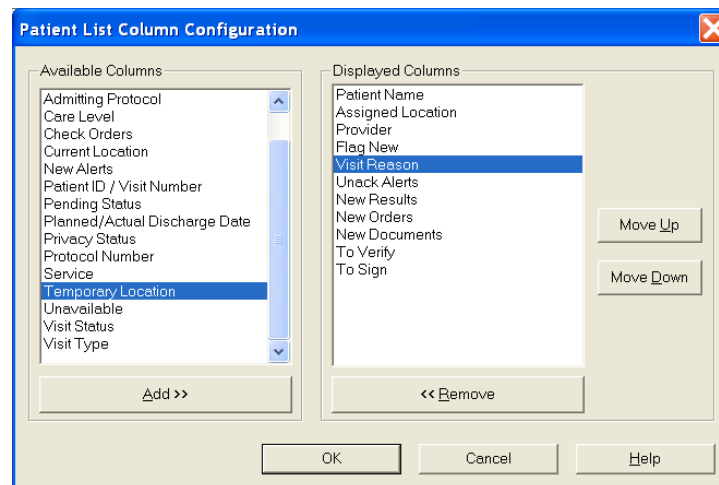
Screen 5.14: Patient List Column Configuration Dialog Box

4. Select any of the columns of information you want to display from the **Available** list.
5. Click **Add**.
6. Click **OK**.

Remove columns from the current list

1. Select the **Patient List** tab.
2. Select a **Current List**.
3. From the **View** menu, choose **Column Selection**. The **Patient List Column Configuration** dialog box opens.
4. Select the columns you want to remove from the **Displayed** list.
5. Click **Remove**.
6. Click **OK**.

**Change the column sort order in the patient list**

1. Select the **Patient List** tab.
2. Select a **Current List**.
3. From the **View** menu, choose **Column Selection**. The **Patient List Column Configuration** dialog box opens.
4. Select the column that you want to move up or down.
5. Click **Move Up** or **Move Down**, according to where you want to position the column. The higher the column is in this list, the farther to the left it displays in the **Patient List**.
6. Click **OK**.

Sorting Columns

After you have defined the columns in a **Patient List**, you can use the **List Sort Criteria** dialog box to define the order in which you want patients to be displayed. You can select three different levels of sort criteria, a level of priority for each criterion, and the sort order for each criterion (**Ascending** or **Descending**).

Sort a patient list

1. Select the **Patient List** tab.
2. Select a **Current List**.
3. From the **View** menu, choose **Sort List**, or click the **Sort List icon** on the toolbar. The **List Sort Criteria** dialog box opens.
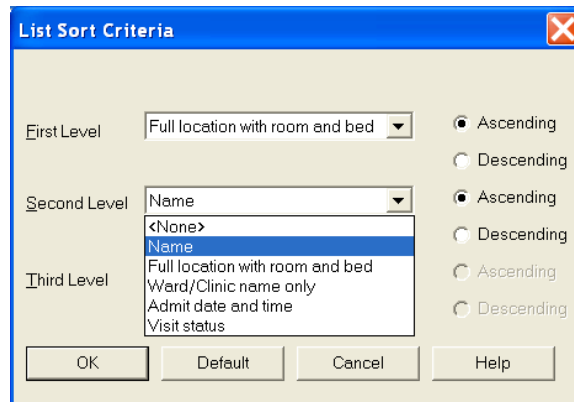
Screen 5.15: List Sort Criteria Dialog Box

4. Select a criterion in the **First**, **Second**, and **Third Level** fields.
5. Select a sort order for each level, either **Ascending** or **Descending**.
6. Click **OK**. The sort criteria are saved with the list, so the next time the list displays, the new criteria are used.

Creating a Criteria-based Provider List (Recommended)

It is recommended that Providers create their own Criteria-based Provider List selecting themselves as the provider and selecting one or more roles as appropriate for their provider type. A criteria-based Provider List displays patients associated with the provider across patient visits. This means that as a patient's visit status changes from inpatient to outpatient (and visa versa) the patient continues to display on the Provider List and the list is updated with the correct visit (the current, active visit). Working from a Provider List built with the correct criteria will assist the provider, in particular, when they are entering orders.

It is also suggested that providers add the column **Visit Status** to their provider list. The **Visit Status** column displays whether the visit is the **ADM** visit (the current, active visit), a **DSC** visit (an inactive, past visit) or whether the patient is on Pass, **LOA**.

Steps to build a criteria-based provider list

1. Select the **Patient List** tab.
2. From the **File** menu, choose **Maintain List**, and then **New**. The **Client Selection Criteria** dialog box opens.
3. Select the **Provider** tab:
   a. As an example, if you are a physician in practice with associates and are on call, you could create a list of your associates' patients, as well as your own patients. You can enter all or part of the

provider's last name. When you enter the first letter, a list of names starting with that letter displays. As you enter additional letters, the list scrolls to the first entry that matches.

How to Add a Column on the Patient List tab

To add the **Visit Status column** to your **Provider List**:
1. Select the **Patient List** tab.
2. Select your **Provider List**.
3. From the **View** menu, choose **Column Selection**. The **Patient List Column Configuration** dialog box opens.
4. Select the **Visit Status** column from the **Available** list.
5. Click **Add**.
6. Click **OK**.

Provider Roles

Physicians
Physicians can identify themselves (their role) as either:

1. Attending
2. Consultant
3. Primary Physician
4. Other Physician

Nurses
Nurses can identify themselves (their role) as either:

1. Nurse
2. Primary Nurse
3. Research Nurse
4. Other Nurse

Affiliate Medical Staff
Several Affiliate Medical Staff members who may follow patients across visits can also select their role as a Care Provider. These are:

1. Acupuncturist
2. Anesthesiologist
3. Bioethecist
4. Dental Hygienist
5. Genetics Counselor
6. Infection Control Coordinator
7. Medical Student

8. Occupational Therapist
9. Pharmacist
10. Physical Therapist
11. Radiation Therapist
12. Recreation Therapist
13. Registered Dietician
14. Respiratory Care Practitioner
15. Social Worker
16. Speech Language Pathologist
17. Spiritual Minister
18. Vocational Rehab Counselor